**CONSENT AND PROFILE**

Client informed of the purposes for which we hold and use their personal data and that it would be stored securely in Casebook:

Client gave explicit consent for recording of the following types of special category data – state each type:

Capability or vulnerability issues identified with client:

Does client have access to the internet and are they able to use it?

**EXPLORATION**

Client’s personal circumstances:

Client lives with alone/with partner, has children aged ………

Childcare costs …..

Housing – rents/owns – private landlord/housing association *–* amount of rent…..

Health conditions – client has/does not have health conditions that limit capability to look for work

Client is working and/or in receipt of other benefits…..is Client a carer?

Clients savings

Client’s goal: assistance with claiming UC because…………..

**Help with UC Claim:**

Explained UC is a benefit that replaces legacy benefits and is paid monthly. Your Universal Credit payment is made up of a standard allowance and any extra amounts that apply to you, for example if you: have children, have a disability or health condition which prevents you from working and/or if you need help paying your rent.

CL was supported with setting up a personal email account. CL kept a note of account and password.

Cl was supported with setting up a UC account. CL kept a note of account and password.

Cl was supported with making an appointment for help with verifying ID at Job Centre: - Cl was advised of documents needed for verification

Cl was reminded of the need to attend meeting at local job centre within 7 days of the claim in order for the claim to be processed or Appointment made on ………

Explained to CL how claimant commitments, conditions and sanctions work

Demonstrated to CL how to use and work with the UC journal including how to report change of circumstances

Explained CL may get assistance with council tax through Council Tax Reduction, this needs to be claimed separately through the local authority. Explained we or local CA can assist with this if needed – details provided.

**Assistance during the waiting period/Payments:**

Explained to CL that there is usually a 5 week waiting period until first payment, made up of a one month assessment period and up to 7 days for the payment to reach your account. Explained that after the first payment, you’ll be paid on the same date of every month (or before in case of weekend/bank hol)

Explained that CL can request an advance payment of UC, this is paid back as a deduction from future awards on a monthly basis. Cl can call 0800 328 5644 to request advance payment or request on journal or at Job Centre

Explained that CL can access through us or contact local CA for a referral to a food bank if needed during the waiting period.

Any other issues not related to UC (e.g. Debt, Housing)

BEF identified?